

Log In Page



Customer Portal

* Account Name

Time/Date

Functions

Billing

Payroll

Reports

Client Controls

Add Client

Billing Page

Client List

Form Columns

Client Name

Client DCN

Hours (with 2 place decimals)

In-Patient Dates (Can be a memo section)

Client Lists and function

Users would have lists of clients for billing process. The lists would include the client name and Client DCN, along with the hours to be billed. Each lists data should be entered and retained and reports. The forms/lists should also have calculation functions (discussed below). The User should have the ability to add clients to the list, but only the Master User can delete clients.

Functions

Retain data entered

Calculations

Convert Hours entered to Units

Multiply Units by Cost

Sum total hours entered, costs and units

Subtract total hours entered from Client Total Available units (this must be crossed with Client Info) and multiply by Cost for Unbilled Units total

Costs of Units differ to type of services. Each list would either be indicated by User office location or Service Type

Payroll Page

The Payroll Page should allow Users to choose the Client from a Drop Down to enter into the Client Page. After Users have entered the desired hours to pay the employee(s) on the Client Page, there should be a Sum Report of Hours entered for cumulative of all the Clients. Reports by both individual and total Pay Run, along with Cash Requirements (Tax Withholdings) by Check Date and Pay Period. The process should also include Payroll Deductions and Withholding Calculations for Tax Reporting. Users have the ability to add Clients, only Master can delete.

Client Page

- Date Range and Check Date
- Client Name
- Employee(s) Name
- Total Regular Hours
- Pay Rate

Client Info Page

This is akin to CRM/ HR Management Plugins. The following Client Info to be retained and included in functions. It will contain information needed for Billing Page Calculations.

Client Info

- Name and Contact Information
- Diagnosis Code
- DCN
- Type of Client
 - CDS, In-Home, Veterans
- Care Plan Information
 - Services by Billing Code
 - Units
 - Effective Dates for Services